

## E-Mailing from IVEE

Steps to take:

1. Modify User Roles (if needed) to allow access to set up email
2. Vendor Maintenance – add PO e-mail address
3. Employee Maintenance – must have e-mail address
4. *Security > User Security* – must have employee name selected
5. Printing Purchase Orders – check the e-mail boxes as needed

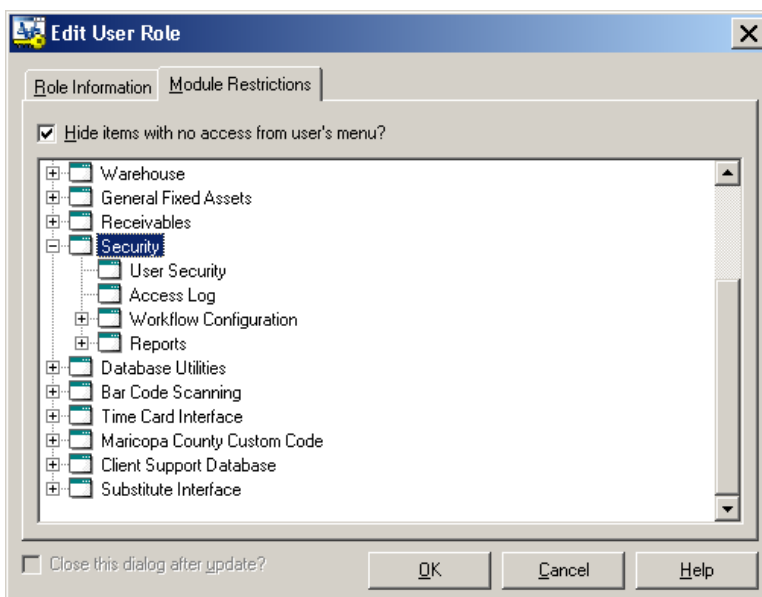
You can also bring up reports or listings and e-mail them directly to staff using the email button!

## Step 1:

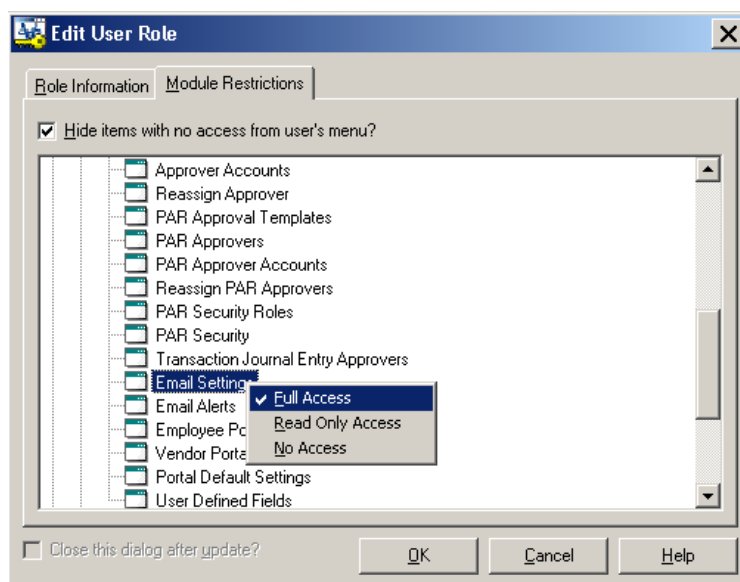
In order for users to enable the email functions within Enterprise, someone must be able to access the Security Module. To allow your users to utilize the Security icon, your User Roles will need to be modified. **This is only required for the initial setup for using e-mail and does not need to be given to everyone.**

From within Visions Administration, select User Roles from your entity, and open the user role that requires modification.

You will need to expand Security and Workflow Configuration.



You will need to allow Full Access to Email Settings and Email Alerts to set up your email use.



## Step 2:

In **Purchasing & Payables > Vendors > Vendor Maintenance** make sure to enter the PO Email. This is the email used when sending PO's from IVEE.

**Edit Vendor**

Actions

Primary Addresses | Additional Remittance Addresses

**Order Information**

Name: ABC SCHOOL SUPPLY INC  
 Street: 2920 OLD TREE DRIVE  
 City: LANCASTER  
 State: PA Zip: 17603  
 Phone: (800) 669-4222 Ext: 0 Fax: (800)-933-2987  
 Contact:  
 Email: customerservice@abcschoolsupply.com  
 PO Email: orders@abcschoolsupply.com

**Remittance Information**

Name: ABC SCHOOL SUPPLY INC  
 Street: 2920 OLD TREE DRIVE  
 City: LANCASTER  
 State: PA Zip: 17603  
 Phone: (800) 669-4222 Ext: 0 Fax: (800)-933-2987  
 Contact:  
 Email: customerservice@abcschoolsupply.com

General Information | 1099 Information | Vendor Terms | E Procurement Information | User Defined Fields

Number (Code): 52480 Customer Acct: ☐ Active ☐ Use Tax ☐ PR Vendor  
 FYTD Balance: \$0.00 Web Site: WWW.ABCSCHOOLSUPPLY.COM  
 Medicaid Class: ☐ W9 Received  
 Comments:  
 PO Note:

Mode: Edit - Record 1 of 1 ☐ Close this dialog after update? OK Cancel Help

### Step 3:

In *Payroll > Employees > Employee Maintenance* enter an email address for your employees. While it would be more beneficial in the long run to have an email address for all your employees, for the purpose of Purchasing & Payables you only need it for your Originators.

**Edit Employee Master**

Action

Employee Selection

Employee ID: GA78100 Prefix: MRS First: PEARL Middle: E Last: GATES Generation:

General Information Dates / Demographics

General Information

Badge ID: Social Security Number: 187-83-1411

State ID:

Mailing Address: 8598 W. Beat St.

Street Address: Maricopa AZ 852390000

4041 N. Central Suite 1100

Phoenix AZ 85012

Primary Job Title: Classified Cafeteria

Comments: Misc. Info #9: 0

Issue Payroll Check ☐ Archive ☐

Substitute ☐

Status: Inactive

Employee Category: Cafeteria

Gender: ☒ Female ☐ Male

Marital Status: ☐ Single ☒ Married

Email Address: pgates@mydistrict.com

Check Location: District Office

Template:

Home Phone: (602)-817-4623 ☐ Unlisted

Work Phone: (602)-372-4833 Ext: 0

Cell Phone: ( )-.-

Mode: Edit - Record 1 of 1

☐ Close this dialog after update?

☐ Process employee setup wizard?

OK Cancel Help

## Step 4:

In **Security > User Security** you will need to link your users to their appropriate employee record in IVEE. You do this by using the drop-down box and selecting the matching employee for each user.

**Edit User Security**

User Information

User ID:

Name:

P & P Security Options | PR Security Options | Restrictions | Assigned Accounts | Emp. Maint. Options | WH Access | Available DACs

PO Approval Limit:

Invoice Over PO Limit:

☒ Limit to expense accounts on requisitions and invoices

☐ Limit to user's own requisitions/invoices

☒ Allow signature printing on purchase orders

☐ Allow signature printing on checks

☐ Allow invoice payments without purchase orders

☐ Allow user to unpost a voucher that already has checks written

☐ Allow P & P central site user to override approval process

☐ Allow reprinting of checks

Override Signature

Signature Name:

DAC:

Employee:

Mode: Edit - Record 1 of 1

☐ Close this dialog after update?

OK Cancel Help

## Step 5:

When printing out POs you can now use the options “Email Originator” and “Email Vendor Copy”. The Entity Copy of the PO will be e-mailed to the originator and the Vendor Copy of the PO will be e-mailed to the vendor. Only the remaining copies of the PO will print (i.e. the “File” and “Receiving” copy).

**Print Purchase Orders**

Actions

Record 1 of 98

Filter Criteria

DAC: All

Apply Selection

Clear Selection

Select	Printed	PO Number	Req. Number	Vendor	Vendor Email Address	DAC
<input checked="" type="checkbox"/>	Yes	98	106	MOHAVE EDUCATIONAL SER	ckelly@schools.maricopa.gov	District Office
<input type="checkbox"/>	Yes	97	104	VALLEY PUMP & MACHINE WI		District Office
<input type="checkbox"/>	Yes	96	105	CMR		District Office
<input type="checkbox"/>	Yes	95	102	PLATINUM PLUS FOR BUSINE		District Office
<input type="checkbox"/>	Yes	94	103	Patricia Blair		District Office
<input type="checkbox"/>	Yes	93	101	CASA GRANDE DISPATCH		District Office
<input type="checkbox"/>	Yes	92	100	THOMPSON SAFE, LOCK & KE		District Office
<input type="checkbox"/>	Yes	91	99	Sharon Rosiek		District Office
<input type="checkbox"/>	Yes	90	98	THE PARENT INSTITUTE		District Office
<input type="checkbox"/>	Yes	89	97	OFFICE DEPOT	CMCDONNELL@OFFICEDEP	District Office
<input type="checkbox"/>	No	88	96	New Horizons Cabling		District Office
<input type="checkbox"/>	Yes	87	95	Learn Education Services		District Office

Copies

File: 1 Receiving: 1

Vendor: 1 Entity: 1

Options

☐ Collate Copies ☐ Tax & Freight on Vendor Copy

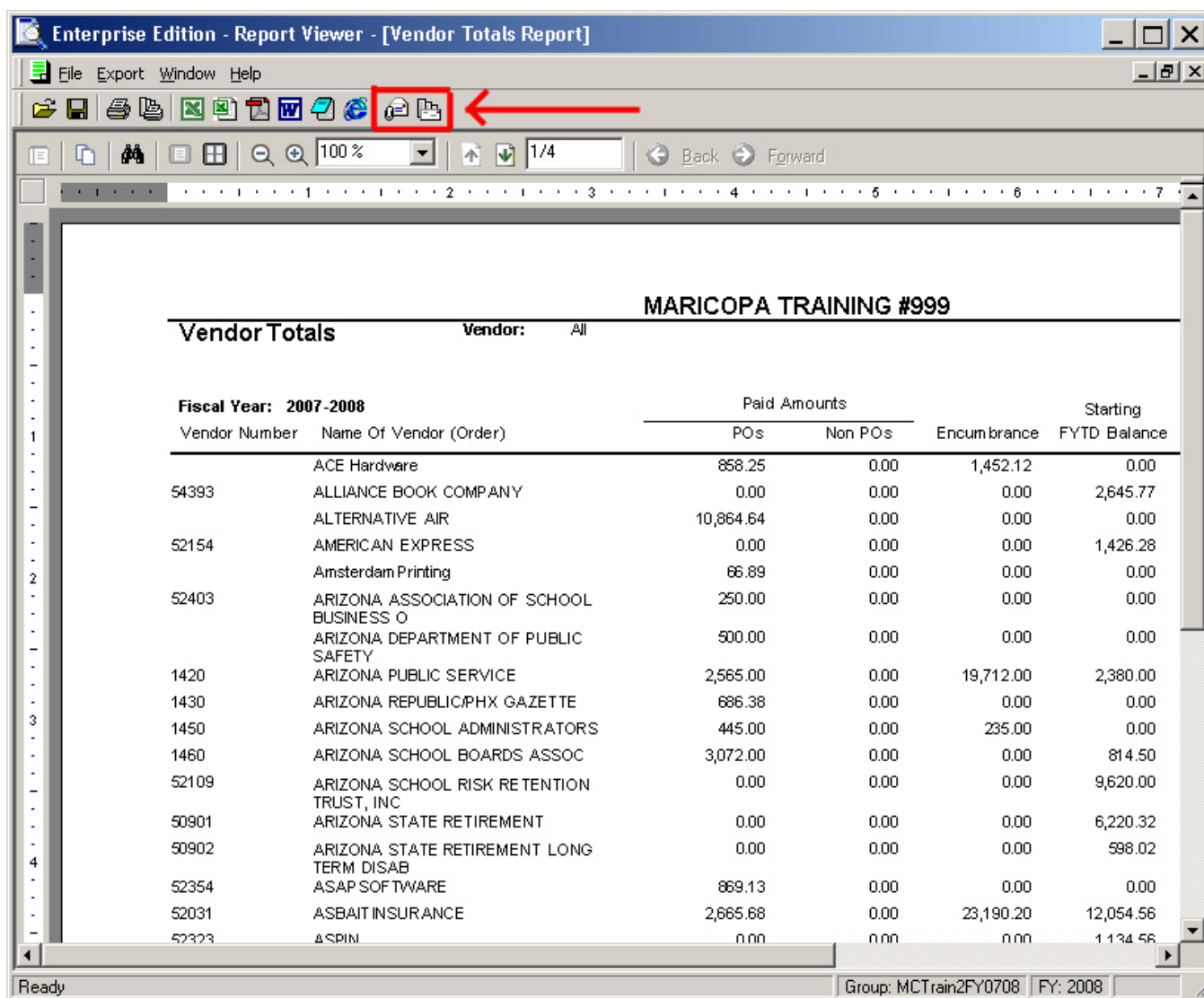
☐ Print Signature ☐ Quantity on Receiving Copy

☒ Email Originator ☒ Email Vendor Copy

OK Cancel Help

## E-mailing Reports in IVEE

Any report that prints in the IVEE Report Viewer now has two e-mail buttons in the toolbar. The first button, the one with an envelope and paperclip, is used when you want to email a single report to someone. The second button, with the envelope and several "letters" behind it, is used when you want to send every report currently in the report viewer to someone.



When e-mailing a report a basic email form pops up. The “To” and “CC” boxes contain drop-down information for any employees with e-mail addresses. If you need to select more than one employee you can manually type their email address into either field and separate them with a semicolon (“;”).

**Email Message**

**To:** mmartin@schools.maricopa.gov; pgates@mydistrict.com

**CC:**

**Subject:** Vendor Totals Report Printed on: 1/16/2008 by mmartin

**Message:**

Good Morning!

Here are some nice reports to get you started for the day...

-Mike

**Attachments**

N:\Program Files\Infinite Visions Enterprise Edition\Report from mmartin .PDF

**Send** **Cancel** **Help**



This document originally compiled by Lupe Bandin @ Tolleson Union High School District #214. It has been recreated and slightly modified by Mike Martinez due to some problems with scanning the original document.